NHS Introduction to CMIS Training Guide 2024/25

Introduction to Events Creation and Management

Contents

1. Introduction

This guide is for NHS staff who are involved in booking rooms in CMIS.

The aim of this guide is to provide information to allow NHS staff to book events on the CMIS system.

2. CMIS Timetabling Software

2.1. CMIS Overview

CMIS (sometimes called Facility CMIS) is a commercial software package used to create and maintain timetables and bookings.

It is the system we use for timetabling courses and all other room bookings. It is used to manage all centrally controlled space and local teaching space.

CMIS is connected to a database which holds the University's timetable information.

2.2. Login to CMIS for the First Time

To access CMIS you will need to log in through the Glasgow Anywhere Desktop.

When you connect to the Desktop you may be prompted to log into your Microsoft account – you should log in using your University email and password.

Your browser may automatically use your NHS credentials, in which case you can open a new window in private mode to avoid this. This is usually accessed by selecting the 3 dots in the top right of your screen and going to either new incognito window (Chrome) or new InPrivate Window (MS Edge).

This will take you to your default browser where you will need to select Staff Desktop.
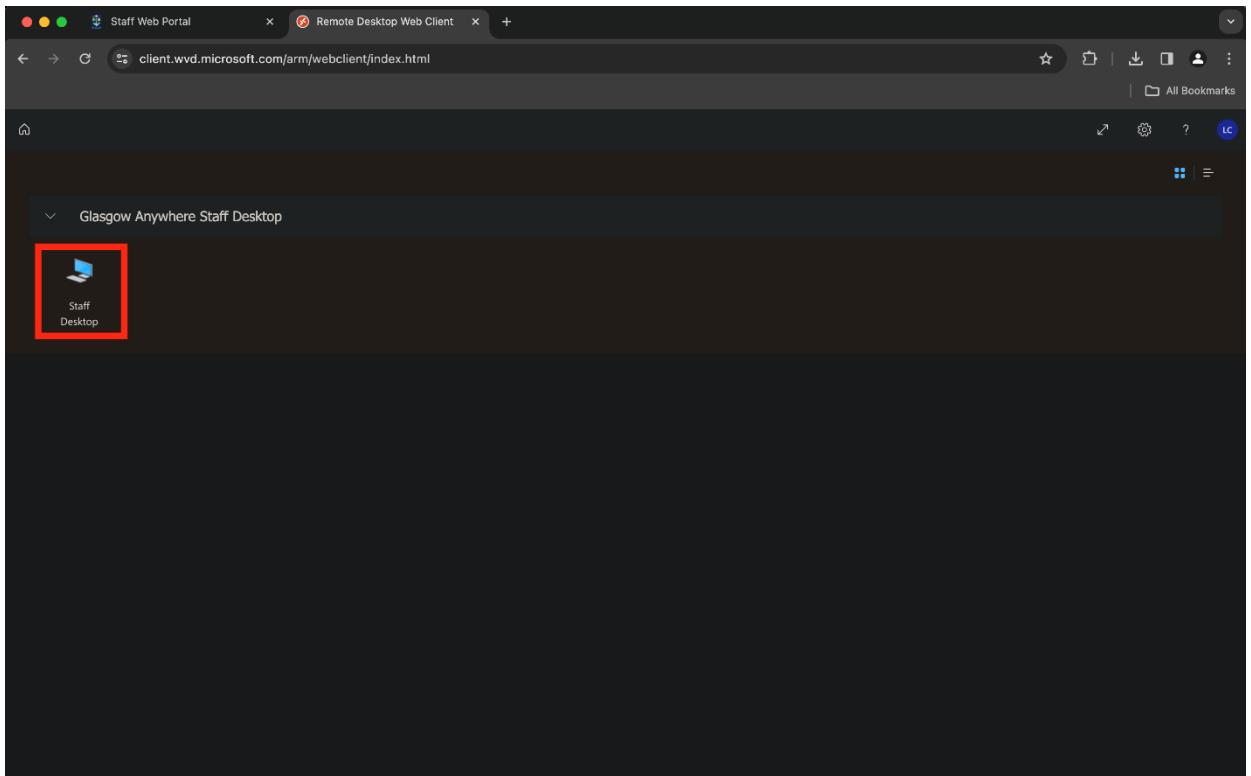
You will then need to authenticate using your Glasgow email address and standard University password. (**Please note:** The username in this instance is your email address, not your GUID.)

When you press Submit, this will open a remote desktop - this may take a few minutes. Once it has loaded you will see a virtual desktop which will include the CMIS icon.
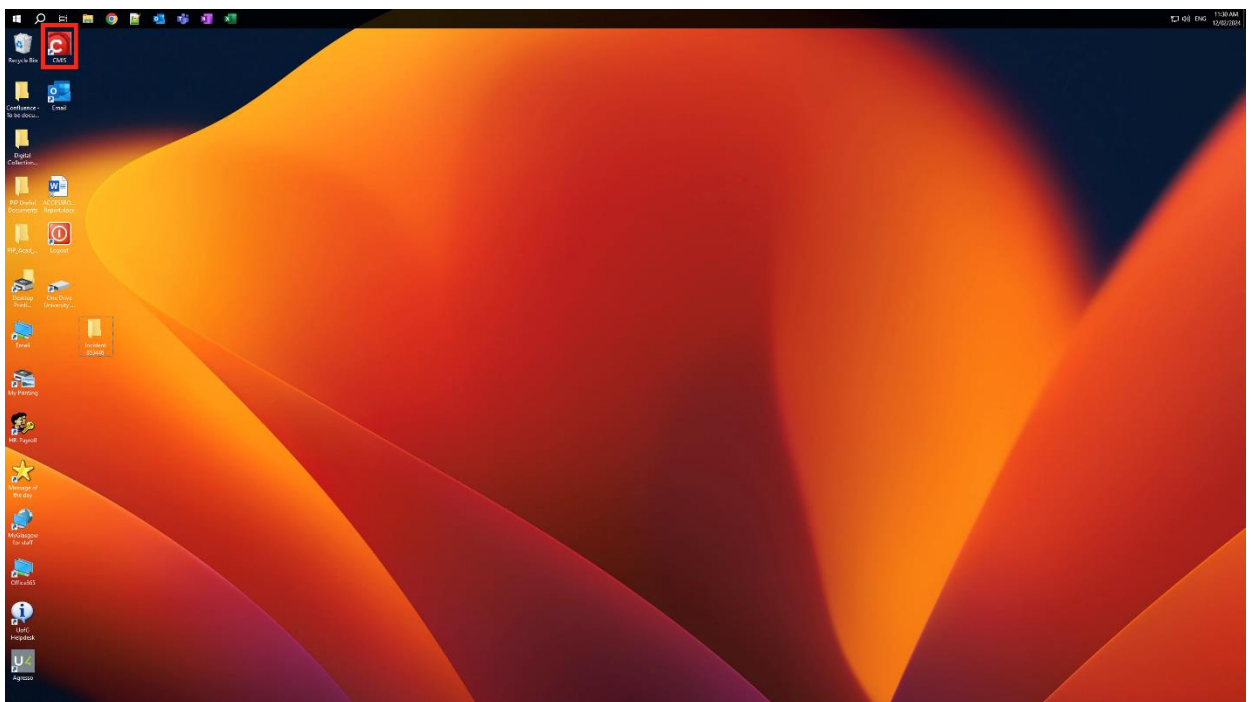
Select the CMIS icon.

A page titled Work Resources will open in a browser window. Select the CMIS icon, then wait momentarily for the Remote Desktop file to download.
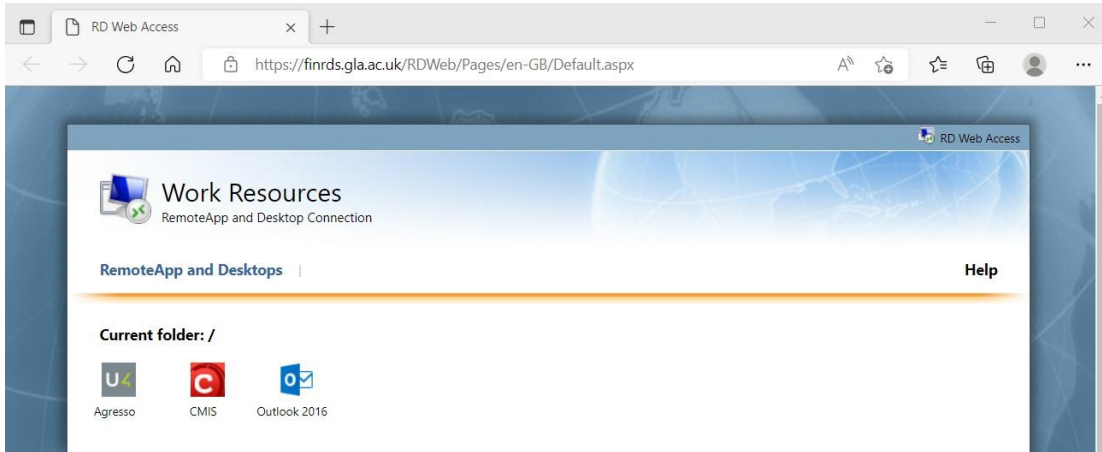
Once the download is complete, it will appear in a list of recent downloads which drops down from the browser's address bar. Click on the 'Open file' link beneath the file name.
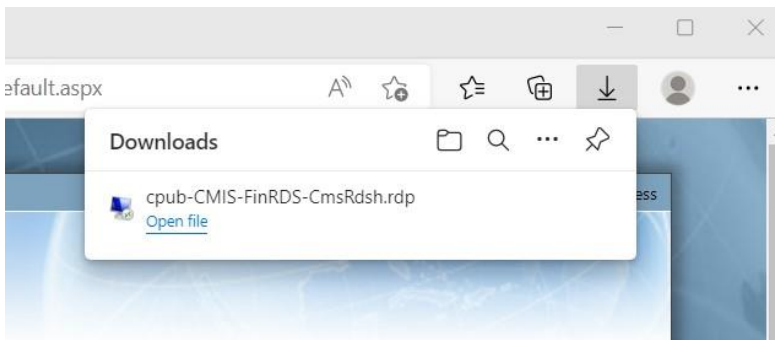
Windows will ask for your permission to open the file – click on 'Connect'.
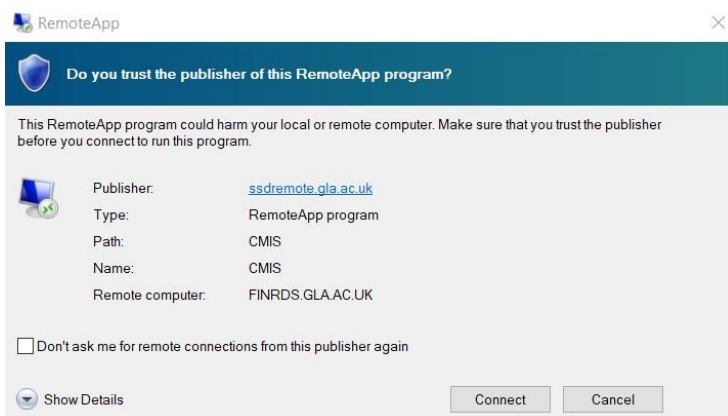
You will then be asked to enter your password. (**Please note:** this is your standard University password, *not* your CMIS password.)
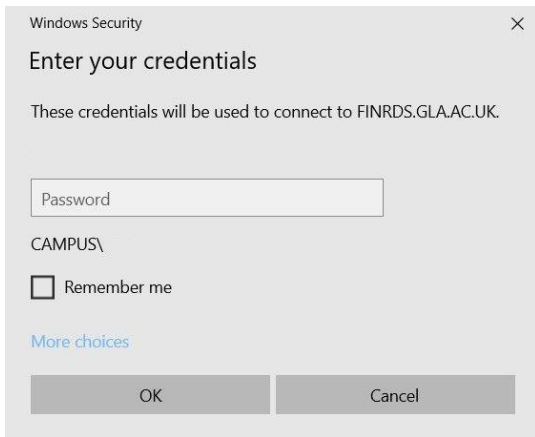
Facility CMIS will open; click on File in the menu bar and select livecmis.MIS from the dropdown menu.
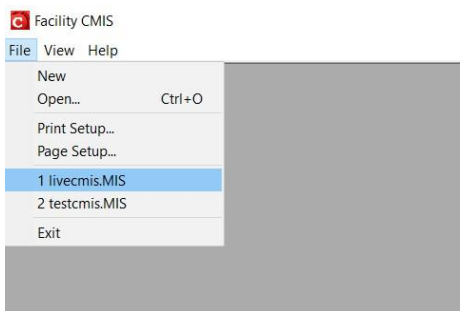
Enter your username and password when prompted. – this will be your GUID and password
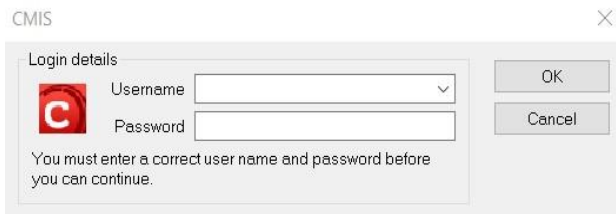
2.3. Log-In Times

Please note the details of the Peak to Off Peak transition times for the [Glasow Anywhere Desktop](), that you will need to be aware of if using the service outside core hours

2.4. Visual Control Path

On opening you will see the screen below. This is called the Visual Control Path (VCP). You can either use the icons to access functions or the Menu bar across the top of the screen.
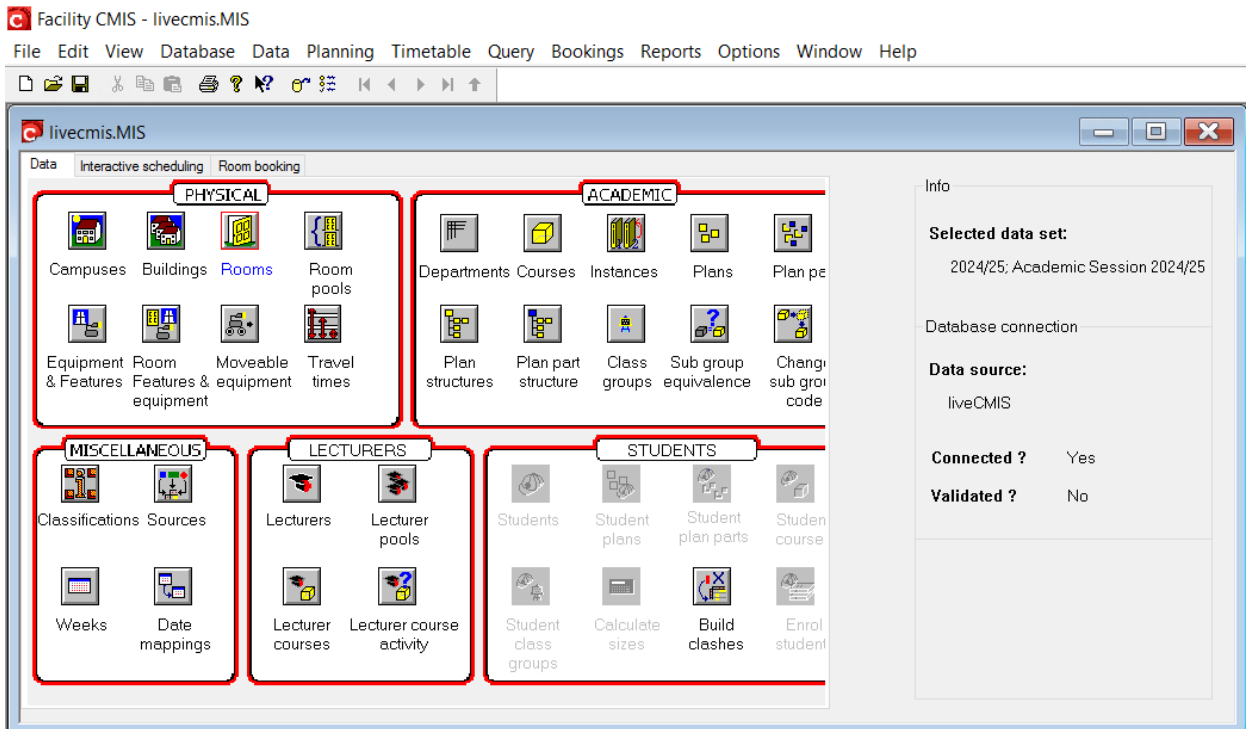
Top Panel

Data source	The database you are connected to (this example above is Live; someone may be using a Training Database)
Connected	Whether the connection is active or not
Validated	Not required for most users
Selected data set	The academic year you are working in (please make sure you are working in the correct dataset)

2.5. Select a Data Set

Data is organised into separate data sets, which represent an academic year.

To select the correct data set in the Menu bar, select **Data | Selected data set.**

Select the data set you are working in.

Be careful at certain times of year as you may be switching regularly between different datasets. For example, when making non-teaching bookings now and preparing next year's class timetable. A quick check on the CMIS Visual Control Path (VCP) will show you which dataset you are working in.

3. Understand the Timetable Views and Filters

To open a new timetable view in the Menu bar, select **Timetable | New Timetable**
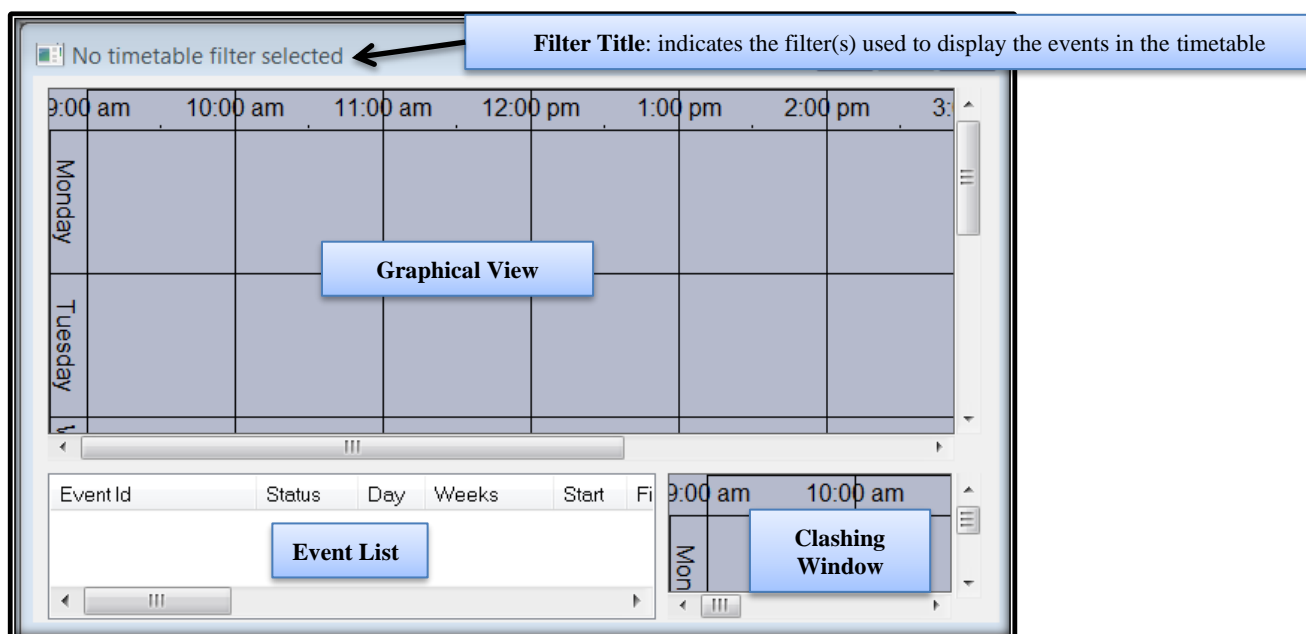
A new timetable (with no filter selected) shows no timetable data until a filter is applied. This shows the different areas of a timetable window which has four elements:

Filter Title	Summary of the filter applied to this window
Graphical View	Timetable data – days on one axis, times on the other
Event List	Timetable data in list format
Clashing Window	Any potential clashes

The timetable window is configurable by the user to display timetable information in many different ways.

When you create a timetable by selecting **Timetable | New Timetable** in the Menu bar, it will be added to your list of timetables at the bottom of the Timetable drop down menu. These can be renamed and deleted by selecting **Timetable | Edit Timetable Views**. To avoid creating lots of new timetables you can just use the Locate Resources timetable or your preferred timetable each time and apply whatever filter you require.

3.1. Display the Filter Button on the Timetable

To prevent having to right-click to get the timetable filter window, you can display a Filter button on the side of the timetable window.

To show the filter button, right click in the graphical view and select **Configuration | Buttons**.
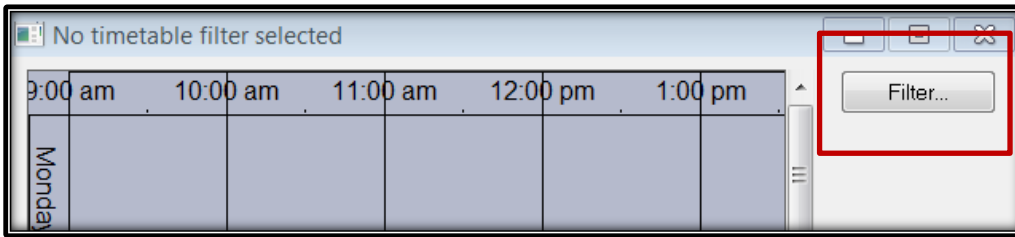
3.2. Filtering the Timetable Window

To view timetable data a filter must be applied to the window. To apply a filter, click on the Filter Button or in the graphical view **Right Click | Filter.**
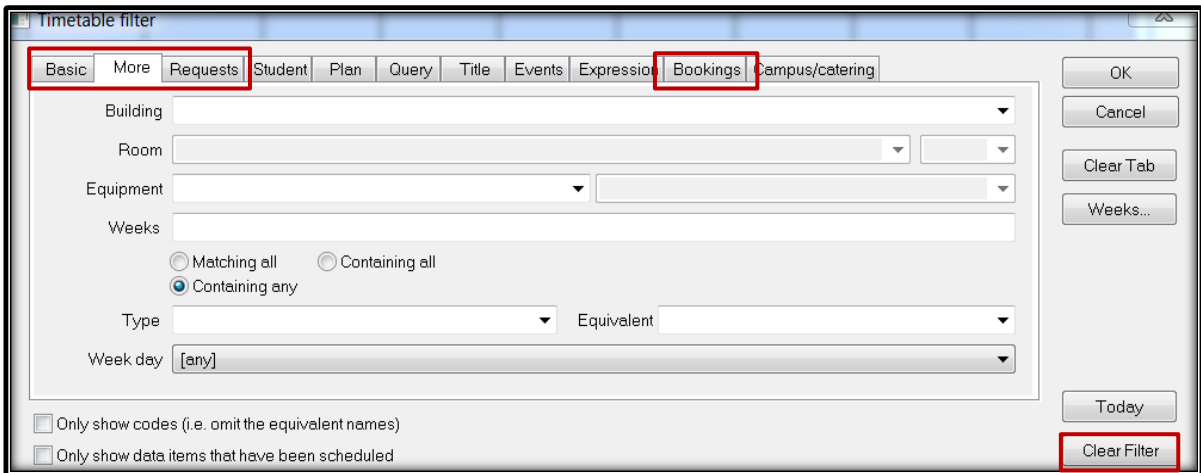
This window contains a number of filter tabs, the most commonly used of which are:

Basic	Filter Department, Course and Lecturer
More	Filter Building, Room, Weeks
Requests	Filter Event Status, Requested Room Type (LOC, CTT), Rooms status (With Rooms, Without Rooms)
Bookings	Filter Contacts, Event Details

If you Clear Filter and then click OK, you will filter to 'All timetable data' which will display the entire University timetable. This will take a long time to load. The current version of CMIS that we are now running will warn you if you have nothing in the filter.

Always clear your filter before applying a new one. This ensures there is nothing unexpected left entered in any of the tabs.

3.3. Second Filter

There is a second filter in the timetable. If the events are showing in the graphical view but are not listed beneath, right click in the Event List and select **Column | Filter | Clear Filter** (in other areas within CMIS you can use the same method of right clicking on the list of data to access the filter options).
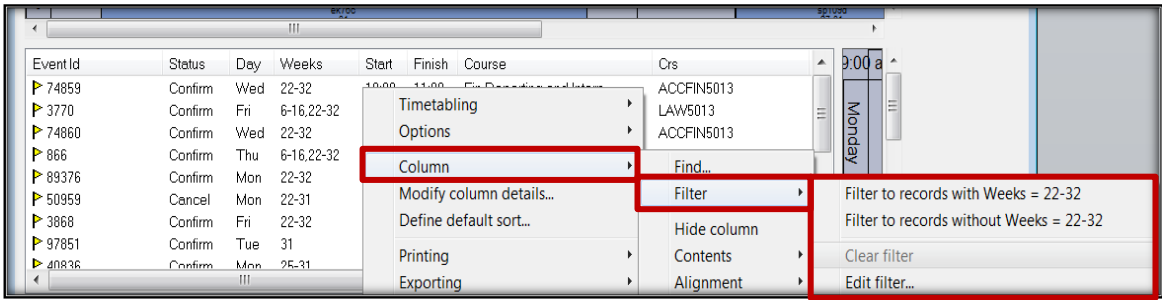
3.4. Displaying a Timetable

Open a timetable window then open the Filter window.

Basic tab Select your Department from the drop-down menu. This would be "NHS TIMETABLING; ; 99099000".

More tab You can also enter the desired weeks to view in the Weeks box (or leave blank to view full year). Please use the SMTT Timetabling Weeks Calendar to see what dates match the week numbers.
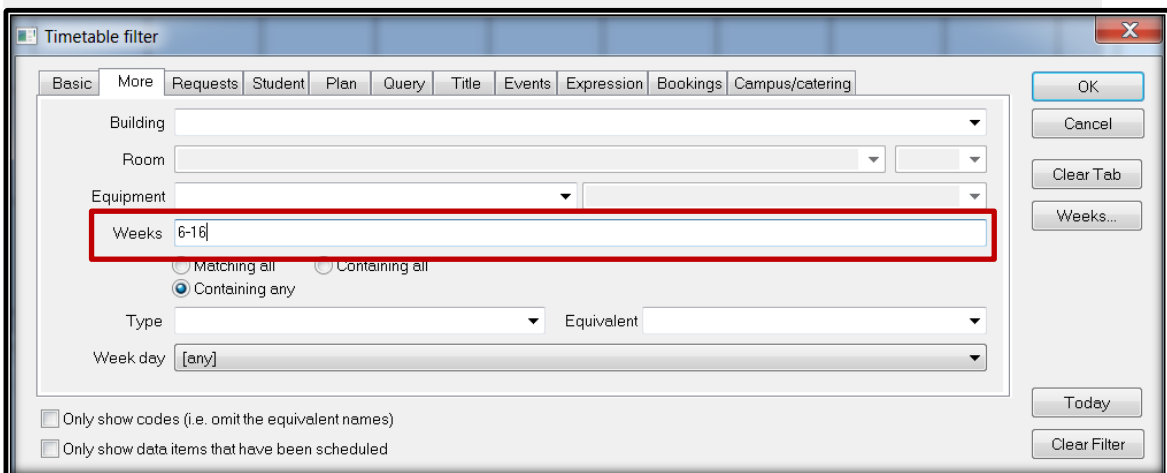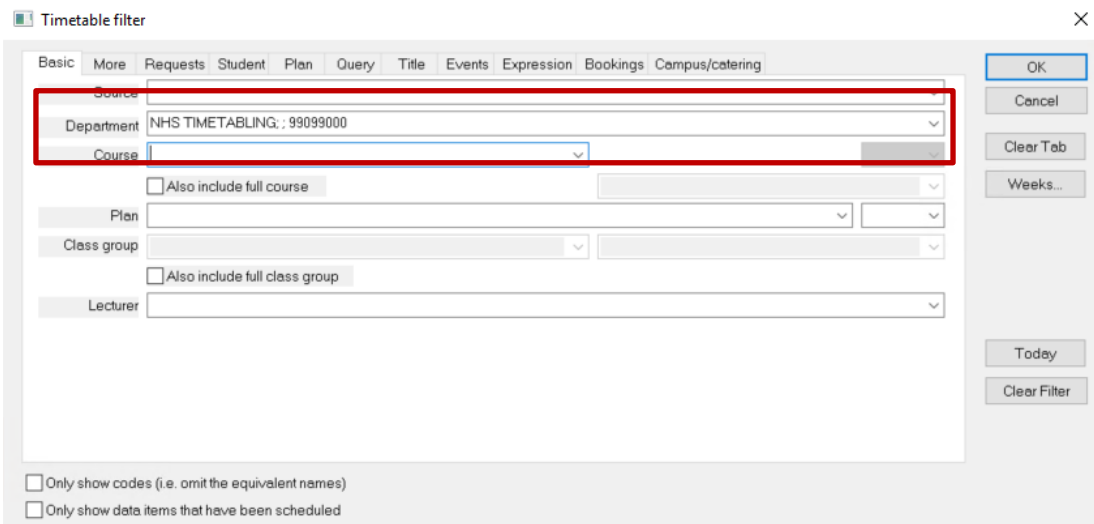
Bookings tab You can enter your name under the Organisation box to view only your bookings. Again, here it will begin "NHS" then your department and name.

Timetable filter   ✕

| Basic | More | Requests | Student | Plan | Query | Title | Events | Expression | Bookings | Campus/catering |

Booking id [▼]   [OK]

Details [▼]   [Cancel]

Contact [▼]   [Clear Tab]

Organisation [NHS   ▼]   [Weeks...]

☐ All

Speaker

Title

Topic

NHS Learning & Education; ; NHSORG0004
NHS Learning & Education; ; NHSORG0013
NHS Medical Education; ; NHSORG0002
NHS Medical Education; ; NHSORG0003
NHS Medical Education; ; NHSORG0007
NHS Medical Education; ; NHSORG0010
NHS Medical Education; ; NHSORG0012
NHS Medical Education; ; NHSORG0015
NHS Medical Education; ; NHSORG0016
NHS National Specialist and Screening Services Directorate; ; ORG085
NHS Peadictric Resus; ; NHSORG0014
NHS Post Grad Office; ; NHSORG0005
NHS Practice Development (N&M); ; NHSORG0001
NHS Practice Development (N&M); ; NHSORG0006
NHS Practice Development (N&M); ; NHSORG0008
NHS Practice Education (AHP); ; NHSORG0009
NHS Resus Training Services; ; NHSORG0011
NHS Rheumatology; ; ORG044
NHS Royal Infirmary; ; ORG472
NHS Tayside; ; ORG098
NHS Vascular Surgery; ; ORG084

[Today]

[Clear Filter]

4. Creating NHS Events

4.1. Adding an NHS Event

1. Open a Timetable and open the filter from the Graphical view.

2. On the Bookings tab select your name from the Organisation drop down. This will start with "NHS followed by your department then name.

3. In the graphical view right click at the required day and time and select New Event.

Fields to be completed when creating an NHS Event

Field	Guidance
Day	Select the day of the week which the event falls on
Start	Insert a start time - CMIS uses the 24-hour clock, e.g. 13:00.
Mins	Insert in minutes how long the event will last, e.g. 2 hours would be 120 Mins.
Weeks	Insert the week or weeks required - please see SMTT Timetabling Weeks Calendar 2023-24. Multiple weeks can be entered separated by commas, hyphens or both, e.g. 1,2,5-8.
Source	This should always be "NHS Event".
Courses	Department – Please select NHS TIMETABLING from the list then Click the "New" button on the right-hand side.
Owner (bottom left)	Owner – if this does not auto-populate please select NHS TIMETABLING from the list.
Class groups	Insert a size in the Capacity box – this shows us how many people would be attending this event – we do not room events with no size. Then click the "New" button on the right-hand side.
Details	Enter a title for the event, then click the "New" button on the right-hand side.
Requested Rooms	Building - Select "Queen Elizabeth TLC-Strat.Med; ; S07" For events which **must** be in a specialist room such as Clinical Skills please also select the required room in the Room box. Category – Please select which type of room you wish, e.g. NHS Teaching, Clinical Skills, etc. Type – This will always be "Local Space". Click the "New" button on the right-hand side

After these have been filled out, please press the "Booking" button on the right-hand side.

Booking Details Fields

Field	Guidance
Org (top right-hand side)	Please select your name - it will begin with NHSORG followed by three numbers, followed by your department then name.
Org Search (bottom left-hand side)	Please type "NHS" in the Org search box then click the downward arrow in the "Matching" box to its right. This should then contain a list of NHS Contacts, please select the one containing your name. Then click the Add button on the right-hand side. PLEASE NOTE: after clicking the add button, the data will seem to disappear, this is because the text has transferred into the "contacts to notify box" and all details are out of sight at the right-hand side of this box.
Status	Please set all new bookings to Provisional.

After this has been done Click OK then OK again to create the event.

Example of a completed NHS Event – Event and Booking Screens

Booking details ✕

Details

Contact [▾] Org [NHSORG0004 [NHS Learning & Education ████████]   ▾]   [OK]

Status [Provisional ▾] [▾] Published [▴▾] to [▴▾]   [Cancel]

Notify [▴▾] day(s) before booking   Created [▴▾] [▴▾]

Notified [▴▾] [▴▾]   Confirmed [▴▾] [▴▾]

Id [   ]   Speaker [   ]

Title [   ]   Topic [   ]

Address [   ]   Notes [   ]

Chair [   ]   URL [   ]

Booked in [   ]   Booked by [   ]

[Add]

[Remove]

[Modify]

Contacts to notify

Code	Name	Company	Phone	Address	Category	Type	Dept	EMail address	Link code	Booking slip	EMail slip	Fax	Mobile	Code	Name
														NHSORG0004	NHS Learning & Ed

Org search [   ]   Matching [▾]

Con search [   ]   Matching [▾]

5. Modifying Events

You can modify your un-roomed events until the end of edit and prep at the end of April. To modify an event thereafter please send an email to timetabling@glasgow.ac.uk detailing all changes required.

6. Logging Out

Upon closing down CMIS you may be prompted to "save changes to CMIS". It is useful to click yes as this will save your timetables and settings.

When closing the Glasgow Anywhere Desktop, use the Logout icon on the desktop to end the session before closing your browser window.